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KNOWLEDGE **PAPERS**

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Protein Supplementation: Regulatory Framework and Consumer Perception

A well-balanced diet is required for adequate amount of macro and micro nutrients including protein, fat, carbohydrates, vitamins, and minerals. However, there are a number of factors responsible for distinct dietary patterns and intake of a balanced diet. Further, there have been mixed perceptions regarding the intake of protein via several sources. Therefore, this report will explore the significant role of protein supplementation along with the regulatory framework and consumer perception of such foods.

The report also highlights the diverse sources of protein most commonly opted by individuals. A comparative analysis of global regulatory framework and India's FSSAI regulations reveals variations in product classification, labelling requirements, and permissible health claims. The survey including 221 subjects examined the protein supplement usage patterns, respondents' behaviour, awareness levels, purchasing behaviour, meal replacement trends and dietary protein intake.

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Indian and Global Perspective of HFSS and UPF

This report presents the Indian and Global perspectives on High Fat, Sugar and Salt (HFSS) foods and Ultra-Processed Foods (UPFs). It provides a brief overview of the development and expansion of the food processing sector and its role in India's GDP. The report also examines the various segments of food processing, their market shares, and their contribution to India's economy. A brief history of HFSS foods and UPF is outlined, highlighting the efforts of various ministries in defining these terms. The report also details the definitions of HFSS and UPF as established by ICMR-NIN (2024) and discusses the challenges linked to the guidelines.

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The Expert's Voice 2025

FICCI hosted the 22nd Capital Markets Conference #CAPAM 2025, bringing together policymakers, regulators, industry leaders, and market participants to envision the road ahead. With the theme "Indian Capital Markets: Driving Growth through Innovation, Technology and Transparency," the discussions highlighted how innovation and trust will play a defining role in building markets that are inclusive, transparent, and globally competitive.

This knowledge paper, compiles perspectives from members of FICCI's National Committee on Capital Markets, offering practical insights and policy suggestions to strengthen India's financial ecosystem.

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The State of ITIs in India A Grading Framework for Readiness & Reform

India stands at a pivotal moment in its skilling journey. With one of the youngest workforces in the world and rapidly evolving industry demands, the role of Industrial Training Institutes (ITIs) in shaping a future-ready, inclusive, and resilient economy has never been more critical.

As we enter a decade of major investment in skilling—anchored by the ₹60,000 crore ITI Upgrade Scheme—the imperative is not only to invest in infrastructure and trades, but also to reimagine how we assess and strengthen institutional performance. This Grading Framework is an important step in that direction. It shifts the focus from inputs to outcomes—particularly Youth Readiness, Industry Alignment, and Institutional Effectiveness.

https://www.ficci.in/study_details/24145



Spotting India's PRIME innovation moment

India's FMCG, retail, and e-commerce sectors are undergoing a transformative shift driven by domestic manufacturing, digital acceleration, and consumer-centric innovation. The growth narrative is evolving from volume expansion to sustainable and inclusive development, anchored in resilient macroeconomic fundamentals.

A dual growth engine is emerging rural India powering scale through affordability-led innovation, and urban affluents driving value through premiumization and direct engagement. Consumers are increasingly seeking wellness-oriented, clean-label, and regionally relevant products, pushing brands to innovate and specialise through M&A, digital-first strategies, and cross-sector collaborations.

D2C and new-age players are reshaping market dynamics via e-commerce, quick commerce, and AI-driven personalisation. India's manufacturing competitiveness and cultural heritage position it to build export-ready, globally relevant FMCG brands, particularly in food, beauty, and wellness.

Policy enablers such as PLI schemes, PM-MITRA parks, ONDC, and MSME reforms are strengthening the domestic production ecosystem. The retail sector is transitioning toward an omnichannel, tech-enabled model, where traditional and digital commerce converge.

Sustainability and inclusion are becoming core strategic imperatives, shaping competitiveness and consumer trust.

Together, these forces are redefining India's consumer economy — making it larger, more dynamic, inclusive, and future-ready.

https://www.ficci.in/study_details/24147



Protecting Urban & Critical Infrastructure with Threat Intelligence

The rising global demand for urban and critical infrastructure-across power, telecom, healthcare, transport, and finance-has expanded reliance on digital technologies, increasing vulnerability to cyber threats. This heightened exposure makes strong threat intelligence (TI) systems essential. TI enables early detection, predictive insights, and rapid response, helping prevent disruptions across interconnected networks. By analysing large datasets and automating mitigation, TI strengthens overall cyber resilience. A coordinated, cross-sectoral approach is necessary to ensure that an incident in one system does not escalate into wider failures. Strategic cybersecurity investments and enabling policies are therefore vital. State-level CERTs, supported by real-time intelligence, enhance readiness and coordinated action. The MahaCyber initiative exemplifies effective governance, continuous monitoring, and federated TI, offering a model for others to adopt. Expanding training, partnerships, and AI-driven capabilities will further boost preparedness. Safeguarding critical infrastructure is ultimately about protecting national stability and securing the future.

https://www.ficci.in/study_details/24129



FIBAC 2025: Charting New Frontiers

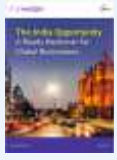
India is at a critical inflection point in its development trajectory. Over the next twenty years, it has a unique window to leverage its scale and momentum to build lasting global leadership. Realizing its ambitious 'Viksit Bharat Mission' will hinge on the evolution of a robust, innovative, and resilient banking and financial sector, capable of supporting India's aspirations for sustainable, inclusive growth. The growth of India's banking assets has been in tandem with its nominal GDP growth over the last 15 years, with the ratio of banking assets to nominal GDP hovering around 0.9x. The drive to Viksit Bharat requires a multiplier of 1.5x. Many emerging and developed economies have seen banking asset growth outpace nominal GDP growth. For India, banking assets need to grow 3.0-3.5 percentage points faster than its nominal GDP. This is not happening today and is a clear risk to India's Viksit Bharat ambition. Currently several megatrends are reshaping the world economic order. Economies and their banking sector operate in a complex, multipolar world with volatile trade flows, shifting supply chains and geopolitical risks. The combined disruption of AI/ GenAI and shifting consumer expectations is unfolding at a scale never seen in the last few decades. The Indian banking industry is poised to reach for leadership – it is profitable, well capitalized and highly valued.

It will need to seize this opportunity by charting new frontiers -

a) Unlocking growth b) Driving productivity

c) Digital maturity and d) Embedding resilience

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The India Opportunity

This compendium, jointly developed by Nexdigm and FICCI, offers a strategic overview of India's evolving economic landscape and its growing appeal as a global investment destination. As the world's most populous country and fastest-growing major economy, India is poised for transformative growth, driven by structural reforms, digital infrastructure, and progressive policy initiatives. With a national goal of becoming a developed economy by 2047, the country is focused on industrial expansion, sustainability, and inclusive development.

The document highlights key emerging sectors such as semiconductors, electric vehicles, green hydrogen, fintech, and AI each supported by targeted government incentives and a conducive policy environment. It provides valuable insights into India's robust consumer base, digital readiness, and efforts to improve ease of doing business.

Designed as a practical resource for global investors, the paper outlines central and state-level initiatives that facilitate foreign investment and enhance India's competitiveness on the global stage. It serves as both a guide and a catalyst for informed decision-making and long-term partnerships between international businesses and the Indian economy.

https://www.ficci.in/study_details/24169



Future-ready workforce 2.0: C-suite strategies for thriving in a shifting world

India's business landscape is undergoing unprecedented disruption. Geopolitical tensions, fragile and inflexible systems, evolving employee expectations, non-linear career trajectories, and rapid technological advancements have given rise to a new and complex workforce paradigm, Workforce 2.0.

This report aims to equip senior Human Resources (HR) and business leaders with a nuanced understanding of the forces shaping today's business environment and the defining traits of Workforce 2.0. To achieve this, we employed a robust three-pronged methodology, combining primary research, secondary analysis, and insights from relevant project experience to ensure depth, relevance, and credibility.

Our primary research included interviews with HR and business leaders, surveys with HR professionals, and inputs from Gen-Z employees. This helped us capture diverse viewpoints and uncover key trends and contrasts across workforce segments.

https://www.ficci.in/study_details/24180



FICCI Consumer Guide on Serve Size and Portion Control

Over the past few years, consumers have been exposed to a global trend of increasing portion sizes, which has contributed to a growing risk of various health related issues. Portion size plays an important role in maintaining a healthy and balanced lifestyle for individuals. Recognizing this, there has been a growing public health interest in reducing or limiting portion size. Therefore, this brings us with an opportunity to identify strategies that can support consumers in regulating their diet and food portions. One such strategy is consumer education.

Further, when it comes to pre-packaged foods, the Nutritional Information Panel on the food labels provide the necessary information on nutrient intake for the consumers. However, the consumers are often puzzled between '100gm' and 'per serve' nutritional content that the food provides.

Therefore, the FICCI Guidance on Serve Size and Portion Control is specifically designed for consumers enabling them to make informed food choices. The guidelines attempt to clarify the concepts of 'serve size' and 'portion control' to make consumers aware of the regulatory mandate and efforts made by FSSAI to educate them. These guidelines also provide consumers with an experience of learning through illustrious examples of food labels, menu labelling and digital information to be displayed.

https://www.ficci.in/study_details/24154



Intelligent Mines & Metal Plants

The Indian mining and metal sector is a key contributor to the country's economic growth and infrastructure development. As the sector navigates an increasingly complex landscape of rising demands, sustainability imperatives and intensifying global competition, the strategic integration of automation, digitalisation and technology has emerged as a key catalyst for transformation.

This report comprehensively examines the sector's current landscape, pinpointing critical challenges and opportunities and outlining a roadmap for growth and development. By identifying the essential enablers of digital transformation-including people, processes, and technology-this study provides an actionable framework for industry stakeholders to harness the potential of emerging technologies and drive sustainable competitiveness.

The Indian mining and metal sector holds significant strategic importance, making substantial contributions to the country's gross domestic product (GDP), employment and industrial development. This report delves into the key challenges and opportunities facing the mining and metal industry, including declining ore grades, escalating operational costs, workforce safety risks, market and price volatility and complex regulatory requirements. To overcome these challenges, the industry can leverage digitalisation and automation to transform business operations and realise growth potential. Emerging technologies such as AI, IIoT, automation, integrated platforms and robotics can enhance operational efficiency, reduce costs and build more resilient mining and metal enterprises.

However, the report also highlights several barriers to adoption, including high capital expenditure, shortage of digital skills among workers, inadequate infrastructure in remote areas and the lack of standardised digital frameworks across companies. To overcome these hurdles, the study emphasises the importance of focusing on three critical enablers of digital transformation: people, process and technology.

The report also highlights that many companies will need to establish strategic collaborations with experts who combine domain depth with project management skills due to lack of in-house capability, experience or bandwidth to drive large-scale digital projects. This factor will often be the difference between a successful transformation and a stalled project.

https://www.ficci.in/study_details/24157



Global AI Race

Artificial Intelligence (AI) has emerged as the defining technology of the 21st century, reshaping economies and businesses. By 2030, it is projected to add nearly USD 15.7 trillion to global GDP1, unlocking unprecedented productivity gains and accelerating innovation across sectors. AI is more than a tool; it is fast becoming a strategic asset that underpins global influence and drives socio-economic progress. This makes it essential for countries and businesses to invest decisively in AI capabilities and resources.

The report outlines the strategic imperatives for India to strengthen its position in the global AI landscape and enhance its competitiveness vis-à-vis leading economies. The global AI race is unfolding across four related dimensions: compute, data, models, and talent. A few countries, such as the United States (US) and China, have taken an early lead by investing in research and development. Others, such as India, the European Union (EU), Singapore, the United Arab Emirates (UAE), and Israel, have endeavoured to focus on building applications, a specialised talent pipeline, and regulatory innovation. Many nations that face structural barriers in infrastructure, funding, and talent risk being left behind, and are completely dependent on imported solutions. This unevenness is also visible across industries, while finance and healthcare, along with sector-agnostic solutions, are advancing rapidly, others, such as agriculture and public services, remain constrained by the longer gestation periods.

https://www.ficci.in/study_details/24163



Evolving Landscape of Global Value Chains

Global value chains are undergoing a structural transformation. For decades, the focus was on scale, efficiency, and low-cost production enabled by globalization. That model is giving way to a new paradigm where resilience, adaptability, and compliance define competitiveness.

This shift reflects the need to manage uncertainty, diversify sourcing, and embed sustainability across networks. Value chains are no longer just a support system—they are now core drivers of growth, innovation, and long-term success. Companies are investing in technology-enabled visibility, regional hubs, and traceable standards to build networks that can withstand disruption while meeting evolving expectations on quality, transparency, and sustainability.

The reconfiguration of GVCs is both a challenge and an opportunity. The challenge lies in adapting to higher thresholds of compliance and efficiency, while the opportunity comes from repositioning as reliable, cost-effective, and future-ready partners in global trade.

The way forward for India rests on four imperatives:

- **Make in India for India**: Strengthen domestic capacity to reduce import dependence and secure critical value chains.
- **Make in India for the World**: Use trade agreements and market access to embed India deeper into global value chains especially in newer geographies.
- **Move up the Value Chains**: Invest in innovation, disaggregation, and higher-value segments across industries.
- **Build Digital & Green Value Chains**: Integrate traceability, compliance, and sustainability as foundations of competitiveness.

In the new era of global value chains, resilience is not the end goal but the foundation for long-term advantage.

https://www.ficci.in/study_details/24165



FICCI-EY report on innovation and critical technologies

The Indian economy stands at a critical juncture. It is already the fourth largest economy in the world and will become, at its current growth rate, the third largest by 2030, behind just the US and China. The Indian economy's growth is being driven by dynamic policies, innovative startups, and its demographic dividend.

This report examines how strategic deployment of technology and fostering of innovation ecosystems can revolutionize these fundamental sectors. Through comprehensive analysis of current challenges, emerging technological solutions, and implementation frameworks, we explore how India can leverage its digital capabilities, human capital, and entrepreneurial spirit to achieve sustainable development goals while maintaining competitive advantage in the global economy.

https://www.ficci.in/study_details/24164



Next-Gen Skills for a Global Workforce: Enabling Youth and Empowering Economy

India stands at a pivotal juncture in its economic and technological evolution. As the global economy transitions from Industry 4.0 to Industry 5.0 marked by innovation and automation the need to equip workforce with next generation skills has never been more urgent. This Thought Leadership (TL) offers a strategic roadmap for India to harness the potential of its demographic dividend, digital infrastructure and policy momentum to become a global leader in the AIdriven economy. It has been prepared through a combination of extensive secondary research and primary interviews with industry experts, ensuring both data-driven insights and practical perspectives.

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INDUSTRY'S VOICE FOR POLICY CHANGE
Federation of Indian Chambers of Commerce and Industry, FICCI
Federation House Tansen Marg, New Delhi - 110001
Phone: 23738760-70 (11 Lines), Fax: 23320714, 23721504
E-Mail: ficci@ficci.com, Website: www.ficci.in
ficci_india ficciindia ficci_india FICCI FICCI India

For more details contact at
tripti.kataria@ficci.com